County LOGIN to DLGF Apps

County IT Session
June 30, 2008
9:00 - 11:00 a.m.
IGC Auditorium
302 W. Washington St.
Indianapolis, IN 46204

Purpose of Training

- This training session is intended for county selected information technology representatives designated as user administrators, to prepare them to administer user accounts for DLGF online applications

- County administrators will be provided information about establishing, administering, and removing a user profile for DLGF county applications.

- Additionally, information will be provided on how to assist county individuals having difficulty with a security profile once established.
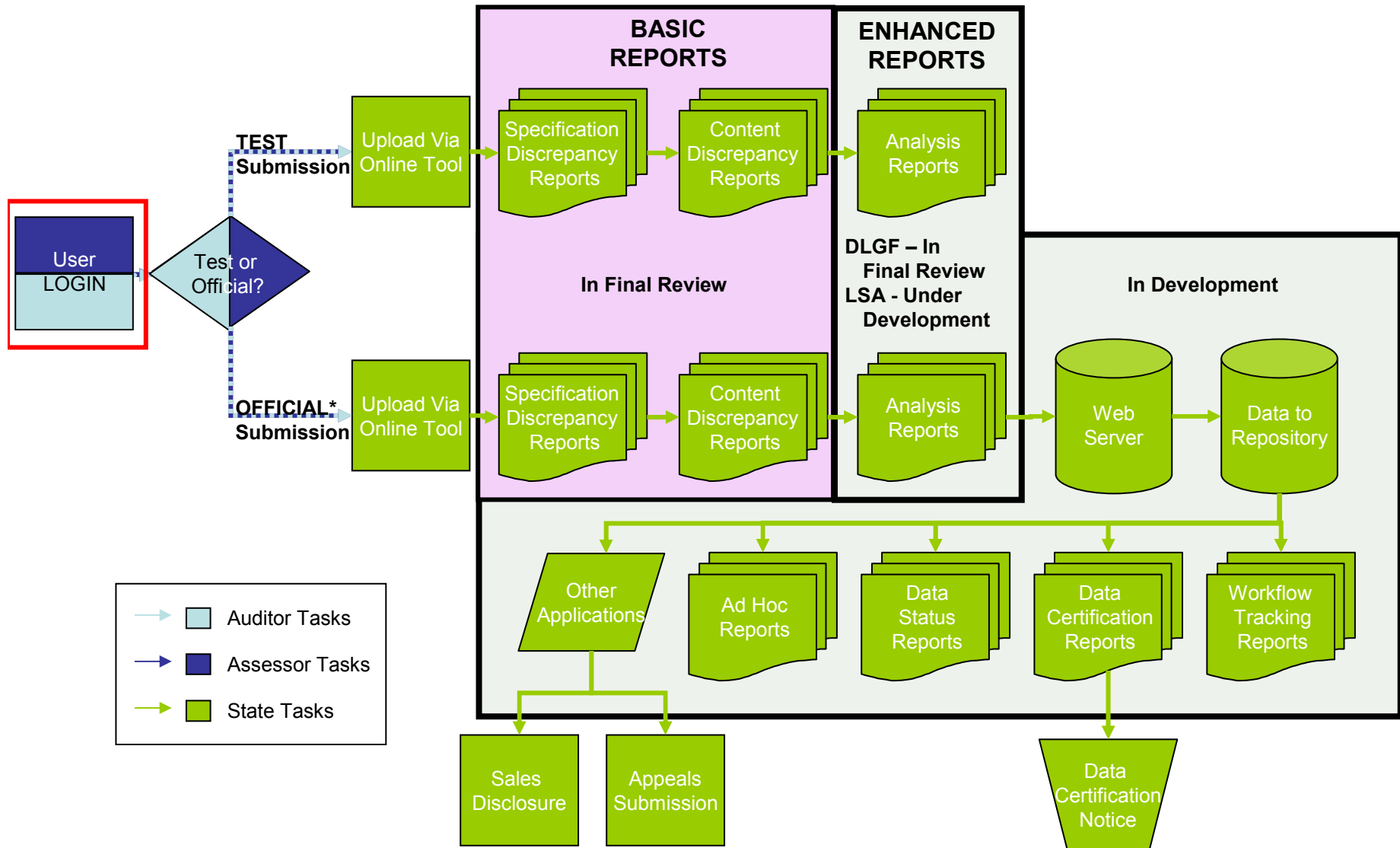
Topics to be Covered

- Overview of DLGF online applications
- Why we need user accounts for these applications
- How the County should set up accounts
- Suggestions for officially tracking accounts established for counties
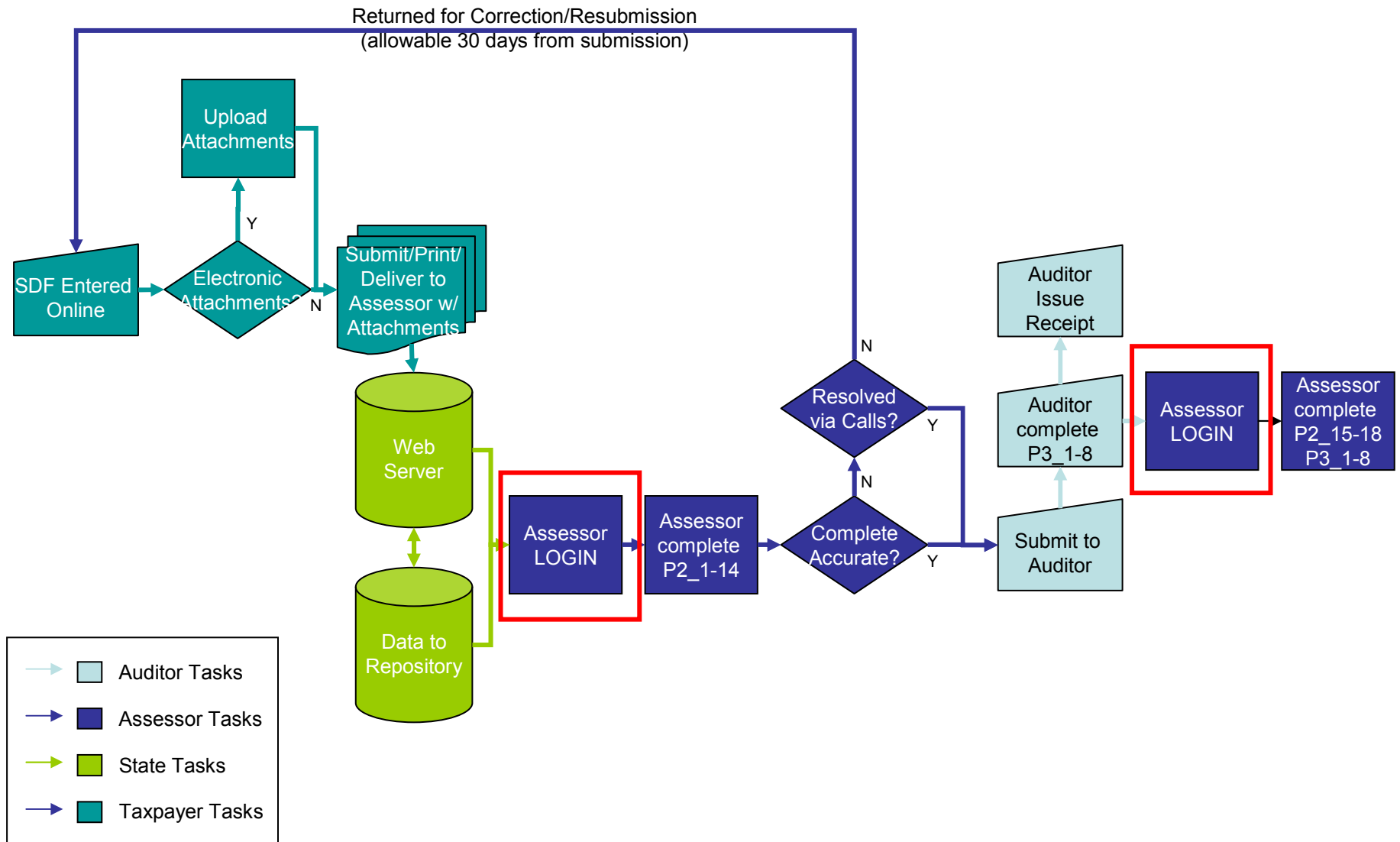- Q&A

Online Applications

- State agencies in cooperation with the Indiana Business Research Center (IBRC), Kelley School of Business have worked to create online applications

- User accounts must be established to assure security of data collection/submission

- User accounts must be established by the office holder responsible for the process
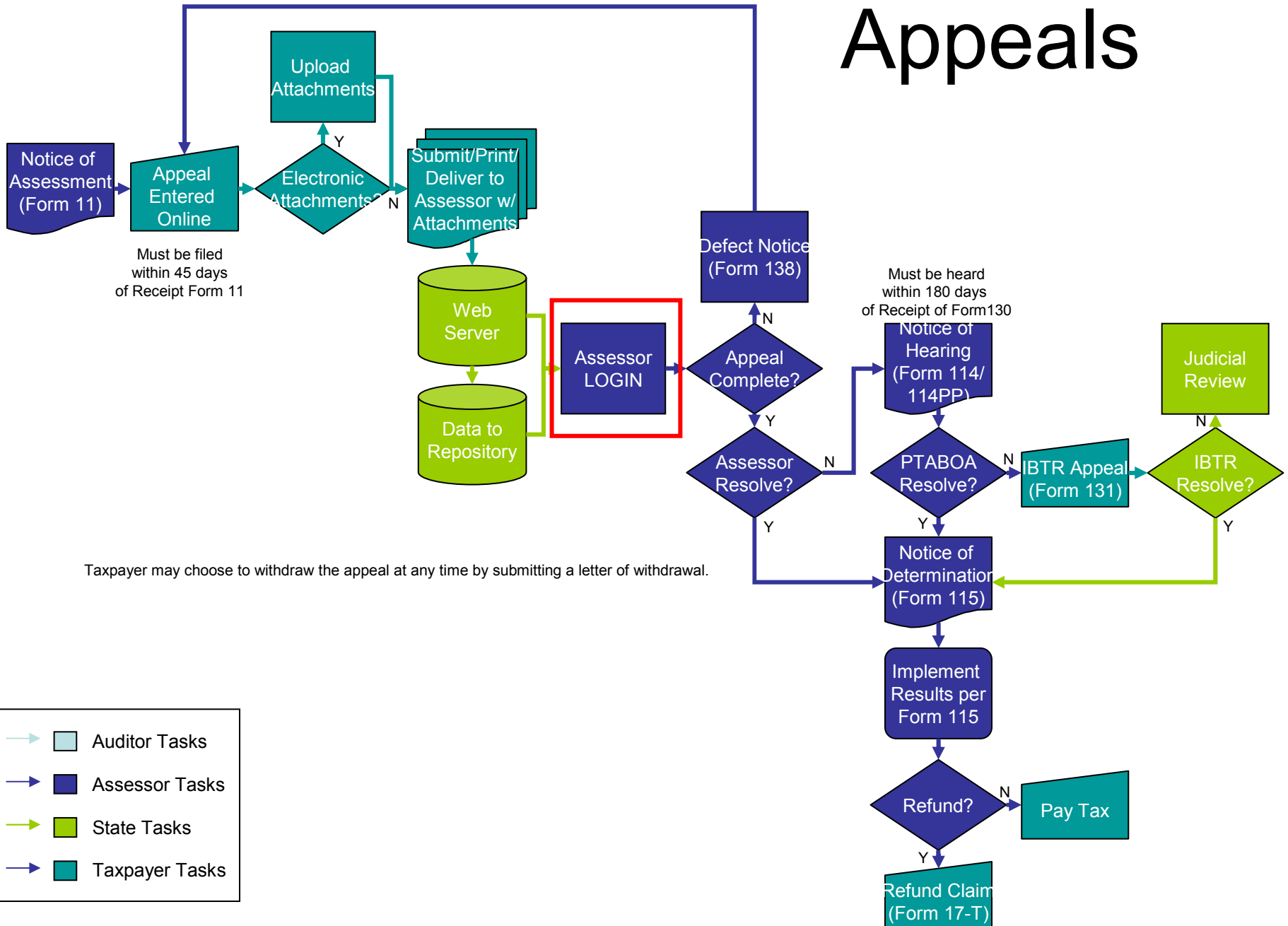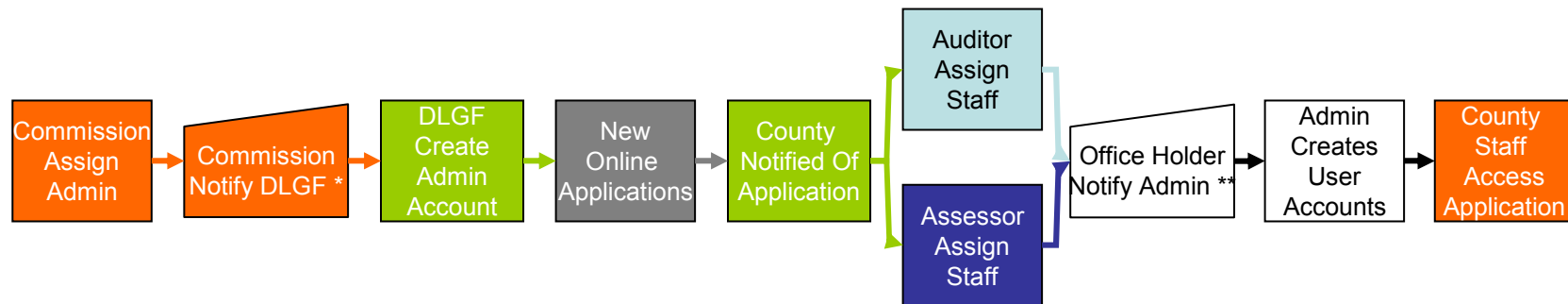
Data Upload and Reporting

BASIC REPORTS

ENHANCED REPORTS

User LOGIN

TEST Submission

OFFICIAL* Submission

Test or Official?

Upload Via Online Tool

Specification Discrepancy Reports

Content Discrepancy Reports

Analysis Reports

In Final Review

DLGF – In Final Review

LSA - Under Development

In Development

Upload Via Online Tool

Specification Discrepancy Reports

Content Discrepancy Reports

Analysis Reports

Web Server

Data to Repository

Other Applications

Ad Hoc Reports

Data Status Reports

Data Certification Reports

Workflow Tracking Reports

Sales Disclosure

Appeals Submission

Data Certification Notice

Legend:

- Auditor Tasks
- Assessor Tasks
- State Tasks

* Non-compliance with data specifications and/or content requirements will result in rejection of OFFICIAL submissions.

Sales Disclosure

Returned for Correction/Resubmission
(allowable 30 days from submission)

Upload Attachments

SDF Entered Online

Electronic Attachments?

Y

N

Submit/Print/ Deliver to Assessor w/ Attachments

Web Server

Data to Repository

Assessor LOGIN

Assessor complete P2_1-14

Complete Accurate?

N

Y

Resolved via Calls?

N

Y

Submit to Auditor

Auditor complete P3_1-8

Auditor Issue Receipt

Assessor LOGIN

Assessor complete P2_15-18 P3_1-8

Legend

- Auditor Tasks
- Assessor Tasks
- State Tasks
- Taxpayer Tasks

Appeals

Notice of Assessment (Form 11)

Appeal Entered Online

Must be filed within 45 days of Receipt Form 11

Upload Attachments

Electronic Attachments?

Submit/Print/Deliver to Assessor w/ Attachments

Web Server

Data to Repository

Assessor LOGIN

Defect Notice (Form 138)

Appeal Complete?

Assessor Resolve?

Must be heard within 180 days of Receipt of Form130

Notice of Hearing (Form 114/114PP)

PTABOA Resolve?

IBTR Appeal (Form 131)

IBTR Resolve?

Judicial Review

Notice of Determination (Form 115)

Implement Results per Form 115

Refund?

Pay Tax

Refund Claim (Form 17-T)

Taxpayer may choose to withdraw the appeal at any time by submitting a letter of withdrawal.

Auditor Tasks

Assessor Tasks

State Tasks

Taxpayer Tasks

Why We Need User Accounts

- Online applications require local county staff to complete

- User accounts must be established to assure security of access

- User accounts must be established by the office holder responsible for the process

County Administrators

- Each County Commission has been asked to designate an individual for their county to be responsible for administering county user accounts
- County Administrators are assigned administrator accounts by DLGF to access online administration tool
- County Administrators are able to manage only the accounts for their county

Authorizing User Accounts

- User accounts must be established by the office holder responsible for the process
  - Appeals are the responsibility of the County Assessor
  - Sales Disclosures are the responsibility of the County Assessor
- As additional applications become available DLGF will identify office responsible

Authorizing User Accounts

Commission Assign Admin → Commission Notify DLGF * → DLGF Create Admin Account → New Online Applications → County Notified Of Application → Auditor Assign Staff / Assessor Assign Staff → Office Holder Notify Admin ** → Admin Creates User Accounts → County Staff Access Application

* Notice must be received in writing from County Commission prior to DLGF setting up administrative accounts

** Notice must be received in writing from County Official prior to administrator setting up user accounts

Legend:
- Administrator Tasks
- Auditor Tasks
- Assessor Tasks
- County Tasks
- State Tasks
- IBRC Tasks
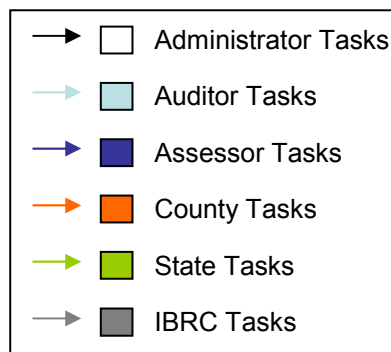
DLGF Login Request Form

- Login Request Section is meant to be completed by the office holder requesting the login for either himself/herself or staff person
- Signature is required

ONLINE APPLICATION LOGIN REQUEST FORM

LOGIN REQUEST SECTION

Office Holder Name: _____ E-Mail: _____

Office: _____

Phone: _____ Fax: _____

Signature of Office Holder: _____ Date: _____

How To Set Up Accounts

- IBRC has established user account tools
- Groups have been established for current tools
  - Data Upload (Administered by State)
  - County Administrators (Administered by State)
  - Sales Disclosure (Administered by County)
  - Appeals (Administered by County)

DLGF Login Request Form

- Once identified, County Administrators will be required to sign a DLGF Login Request Form

- The DLGF Login Request Form should be used if County Administrator does not already have login request form in use by the County

DLGF Login Request Form

- User Information is meant to be completed by the staff person for which the account is being established

- One user may need access to multiple applications

- This information is used by Administrator to complete the online login profile

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USER INFORMATION SECTION

PLEASE <u>PRINT CLEARLY</u> ALL INFORMATION EXCEPT SIGNATURE

User Name: _____ E-Mail: _____

Department: _____

Address: _____

City, State Zip code: _____

Phone: _____ Fax: _____

Application(s) for which Login is Requested: _____

DLGF Login Request Form

- User is required to sign acknowledgement of their responsibilities as user to the online tools

- The County Administrator should keep this document on file

By signing below, I acknowledge that I may not disclose information about computer passwords and identification characters. The login provided by my County Administrator is designated for my use when accessing online DLGF applications and I am responsible for all activity under my login. If I become aware of any breach or suspected breach of information security, I will promptly report it to my supervisor and the County Administrator. The County Administrator should in turn report the matter to the DLGF. In addition, I acknowledge my responsibility to secure all records that may contain confidential information from the view of or access by unauthorized persons. Confidential paper files should be stored in locked cabinets or drawers whenever feasible, should not be left unattended in areas where visitors may enter, and should be disposed of by shredding or other secure method. I understand that I may not allow access to electronic files by unauthorized persons, nor to authorized persons for unauthorized purposes, and that I must follow the electronic security measures for confidential and sensitive information that are established by my supervisor.

Signature of User: _____ Date: _____

DLGF Login Request Form

- The County Administrator should make note of the UserID assigned, who completed, the date completed, and the access granted
- The County Administrator should keep this document on file

County Administrator Use ONLY

USERID: _____ Completed By_____ Date Completed: _____

APPROPRIATE ACCESS PROVIDED: _____

Setting Up a User Account

- Once the Login Request has been fully completed, the County Administrator will need to create a secure user login account for each user

- Only create users that have been approved by the designated office holder for an application

User Management Login

- Requires login and password

- Each County Administrator can establish user accounts for applications

Create a User

- Information specific to the user is required

- Role of individual is required

- As new applications become available new roles will be added

Create a User

- If left incomplete user cannot be created
- Same individual may have multiple roles

Tracking Accounts

- Once users are established they can be managed online through the management tool

- User passwords can be modified, applications added/removed, or account closed

County LOGIN to DLGF Apps

Questions?